

General Expectations for all LO*OP Volunteers

1. This position, although it is not paid in money, is a professional contract. Your continued participation requires that you commit to both general and specific performance targets that you negotiate with LO*OP's volunteer manager, currently Liza Loop. The notes below outline some of the requirements for this position. In a successful volunteer relationship both the volunteer and the recipient organization have clear understandings about their respective goals, requirements, expectations and boundaries. Communicating these candidly will lead to a win-win experience for all involved.

1.1 All LO*OP Center, Inc. volunteers commit to donating 60 hours of their time (the volunteer term) within 6 calendar months of being accepted into the program (except for short-term special events). All time devoted to LO*OP counts including, but not limited to, study, research, planning, attending meetings, consulting with each other as well as LO*OP management and travel time.

1.2 Each volunteer agrees to log all hours worked and submit this record to the volunteer manager monthly or at the 60 hour mark.

1.3 At the end of each 60 hour term each volunteer will meet privately with volunteer manager to evaluate the successes, benefits, difficulties and conflicts encountered during the term. Together they will decide whether to sign up for another term or bring the volunteer relationship to closure. Both parties must agree that each is benefitting from the relationship to continue. LO*OP is only interested in win-win interactions.

1.4 Volunteer and volunteer manager will work out a personal availability schedule in advance of each week of the volunteer's term. Hours may be grouped closely together or spread out evenly throughout 6 months depending of the needs of both parties and the work undertaken. This schedule will cover work to be done on site, remote group work, meetings whether in person or online and event attendance. Scheduling of independent work is at the volunteer's discretion provided that any specified deadlines are met. When participating on a team, volunteer schedules will be made public to other team members so that workflow and collaboration is possible.

When these guidelines are followed LO*OP management is usually delighted to provide positive recommendations and references for volunteers as needed.

Performance Requirements for membership in the Salesforce Support Team

2. Every team member will:

2.1 log into the LO*OP instance of SF at a minimum of once a week, review the chatter feed and verify his/her assignments

2.2 complete a Contact record with name, address, phone, social media information within one week of receiving access to the LO*OP instance

2.3 create a Chatter Free license for him/herself and complete the Chatter Free Overview using Liza Loop's Overview as a template immediately

2.4 follow all Team members

2.5 work out and post a monthly Volunteer Schedule with the Support Team Administrator

2.6 attend Team meetings whenever possible. When a meeting must be missed the Team Member must notify the Support Team Administrator at least two days prior to the meeting and remains responsible for finding out the content of the meeting and acting on any directives. As of July, 2017 these meeting are scheduled for 11 AM PDT on Fridays.

2.6 take on Case Work and On-call Hours consistent with his/her previously agreed-upon volunteer schedule

2.7 deactivate his/her Salesforce SysAdmin License during any period of a day or more when s/her will not be logging on to the LO*OP Instance. S/he can use the Loop, Salesforce user to activate and deactivate his/her license or ask another Support Team Member to do it for him/her.

Case work

3. Case Team Members

3.1 Until further notice Cases will be opened either by one of LO*OP's two staff members, Liza and Tom, or by a LO*OP SF Support Team Member.

3.2 Every effort must be made to resolve Cases within the Estimated Resolution Date entered when the Case is opened. Procedures for working Cases are posted in the Attachments Related List of the SF Support Team Management Case, #1021 and will be updated as needed

3.3 Each active Support Team Member should be working on at least two Cases

3.4 Case Teams & Roles: The Case Team related list must be kept updated with the name and role of each person Case Owner, Case Administrator (for large or complex cases), Case Advisor (if needed by Owner), Case Workers (maximum 3), Case

Observers (other team members who wish to learn from the case), Documentation Writer (if owner prefers not to take on this responsibility)

3.5 Information entered on Case Records is used for teaching, improving processes, documentation and volunteer management as well as actually resolving the Case itself. Case Owner will ensure that as many fields are filled in as possible and complete Case notes are recorded. On complex Cases, Case Administrator will keep this information updated and facilitate communication among Team Members.

3.6 Timing: High priority Child Cases should be resolved within one week, medium within one month, low within the Estimated Resolution Date. Every Child Case must have an Estimated Resolution Date entered by the Case Owner before the Case can be saved. This date may be changed after consultation with the Case Team. Parent Cases will not be resolved until all of their Child Cases are closed and are likely to be open for months or years.

3.7 All work on individual case should be documented as case tasks or case notes.

3.8 Solutions are to be written for the Case Contact. If that person is an end user inexperienced in Salesforce the Solution must provide end user instructions that begin on the contact's Home Page, describe actions to be taken at the keystroke level and use a minimum of Salesforce jargon.

3.9 Procedures for working Cases are posted in the Attachments Related List of the SF Support Team Management Case, #1021 and will be updated as needed. Note that LO*OP's rules for closing cases

4. On-call Hours:

4.1 Every LO*OP SF Support Team Member is required to provide at least one On-call Hour per week s/he is an active team member and to be available by phone and/or online during that time. When not fielding calls during that time the person on-call should be working on his/her Cases. On-call shifts may not overlap with scheduled meetings or another Team Member's shift. On-call shifts are used for trouble shooting Salesforce issues by phone and/or computer conference.

4.2 On-call shifts and scheduled meetings must be posted on the designated LO*OP Salesforce Support Team calendar.

4.3 Some problems can be resolved and questions answered during an on-call session. When no resolution is reached during a session a Case should be opened with the caller as Contact. The on-call Team Member may either take ownership of the Case him/herself or may submit it to the Queue.